

CALIFORNIA COMMISSION ON PEACE OFFICER STANDARDS AND TRAINING

**CTO DEVELOPMENT:
TOOLS FOR THE TRAINER**

TELECOURSE REFERENCE GUIDE

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For additional information contact:

California commission on Peace Officer Standards and Training
TRAINING PROGRAM SERVICES BUREAU
1601 Alhambra Boulevard
Sacramento, CA 95816-7083
(916) 227-4885

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| Lai Lai Bui | Detective Sacramento Police Department |
| Collene Campbell | Public Member |
| Robert G. Doyle | Sheriff Riverside County |
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| Roosevelt Johnson | Sergeant Los Angeles County Sheriff's Department |
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| Nelson C. Lum | Sergeant San Francisco Police Department |
| Henry Perea | Councilman City of Fresno |
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| Bill Lockyer, Attorney General | Ex Officio Member Attorney General's Office |
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TELECOURSE ADVISORY COMMITTEE

| | |
|----------------------------------|---------------------------------------------------------------------------------------|
| Natasha Claire-Espino | Communications Dispatcher II San Mateo Co. Public Safety Communications |
| Kim Current | Police Assistant Walnut Creek Police Department |
| Denise DePew | Communications Training Officer Fresno Co. Sheriff |
| Terrye Flowers | Communications Manager Bakersfield Police Department |
| Maureen Logue | Communications Operator II; Training Liaison Carlsbad Police Department |
| Terri Mazzanti | Communications Supervisor Rohnert Park Public Safety |
| Elise Moeck | Supervising Communications Dispatcher San Mateo Co. Public Safety |
| Kim Moyer | Communications Training Supervisor Riverside Police Department |
| Jan Myers | Coordinator, Basic Dispatch Academy Napa Valley College, Criminal Justice Division |
| Danah Palmer | Dispatch Supervisor Eureka Police Department |
| Yvonne Pintane | Communications Supervisor Mendocino Co. Sheriff Office |
| Carl Rader | Dispatcher II San Diego Police Department |
| Belinda Roland | Training Officer Bakersfield Police Department |
| Lisa Smock | Senior Police Service Representative Los Angeles Police Department |

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| | |
|------------------------|---------------------------------------------------------------|
| JoAnn Terry | Communications Supervisor Vallejo Police Department |
| Virginia Tomek | Police Communications Supervisor Oakland Police Department |
| James Wheelless | Systems Engineer II Stanislaus Regional 911 |
| Randy White | Senior Communications Operator Haywood Police Department |
| Jody Buna | Senior Consultant California Commission on POST |

PREFACE

The trainer is in the key position to ensure that each prospective public safety dispatcher is capable of performing job-related duties with skill, efficiency, professionalism, and pride. For the CTO (Communications Training Officer), the process involves not only imparting basic facts, protocols, policies, and procedures, but also constantly being a role model for the profession. The CTO must demonstrate skill as mentor and coach to build a trainee's confidence. And finally, The CTO must exhibit honesty and integrity to give fair and complete evaluations that guide the trainee's progress.

The following table illustrates the many jobs and responsibilities of a CTO.

| JOB | RESPONSIBILITY |
|------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Role Model | <ul style="list-style-type: none">• Be an above standard employee.• Know and follow all agency policies and procedures.• Set an example by virtue of one's:<ul style="list-style-type: none">— knowledge,— demeanor,— conduct, and— appearance.• Maintain a level of honesty and integrity that is above reproach.• Demonstrate a positive attitude toward the profession .• Establish and maintain an appropriate trainer/trainee relationship. |

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| Trainer/Coach | <ul style="list-style-type: none">• Impart knowledge in a logical and reasonable manner.• Utilize innovative instructional techniques and practical applications.• Encourage critical thinking and individual problem solving skills.• Be patient enough to allow the trainee to learn while completing the task.• Remain calm and composed, even if the trainee is having difficulty performing a task or grasping a concept.• Constantly motivate and encourage the trainee to practice and master tasks.• Be an advocate for the trainee, assisting them through the training program. |
| Evaluator | <ul style="list-style-type: none">• Make the evaluation process a positive learning experience.• Base all evaluations on trainee's performance and conduct, using agency performance standards.• Give clear and informative performance feedback.• Recognize and manage personal biases (both positive or negative) that might influence one's observations .• Submit written evaluations in a timely manner. |

Telecourse Goals

- ☐ It is not the intent of this telecourse to merely repeat previous CTO training content elements. Rather, the goals of the telecourse are to encourage viewers to:
- look deeper and consider the information presented in their CTO basic training in a different light now that they have some experience, and
 - recognize that professional proficiency requires not just

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knowing or repeating facts and procedures, it also requires *problem solving* and *flexible application* of the basics under many varied situations and with different personality types.

- ☐ The second goal of the telecourse is to elevate viewers confidence by:
 - enhancing interpersonal, instructional, and evaluation skills through the use of examples and shared experiences of experienced CTOs, and
 - reinforcing that the individuals CTOs are instructing their future colleagues and team members.

- ☐ The final goal of the telecourse is to promote individual personal assessment of the leadership qualities by:
 - reinforcing a positive commitment and attitude toward the profession, and
 - initiating continued dialogue and sharing among CTOs themselves as well as with agency management.

Target Audience

It is critical to the quality of instructional materials that a specific target audience be identified and materials be developed consistently with that audience in mind. Materials developed without a clear focus or for mass audiences (e.g., the entire public safety dispatcher population) often becomes convoluted, confusing, and lack real instructional substance.

The primary target audience for this telecourse is individuals who are:

- ☐ new to the job of CTO,
- ☐ experienced CTOs looking for new ideas or a different perspective from what they already have learned or are practicing, and
- ☐ managers or supervisors who are called upon to support training efforts within their Communication Center.

Telecourse Organization and Use

This guide provides those who instruct CTOs with reference material to use in conjunction with this telecourse during on-the-job training and continued professional job enhancement. Both are designed to be flexible and can be customized to supplement an existing program or materials.

The telecourse is divided into three distinct segments.

- ***The CTO as Role Model***
- ***The CTO as Trainer and Coach***
- ***The CTO as Evaluator***

All segments may be viewed together at one sitting or separately (e.g., during roll call or separate training sessions). Each segment covers key issues regarding the roles and responsibilities of a CTO and is presented in a scenario/tutorial format with primary emphasis given to the *application* of the issues just presented. Questions are posed to the viewer directly and answers/clarifications are provided by Subject Matter Experts.

At the end of each segment, viewers have the opportunity to review key content elements and discuss their own communication center's specific guidelines and procedures for handling training issues and topics similar to those presented.

This reference guide also provides additional material and information, as well as references, that may be used by individual instructors to promote further training and discussion.

I: CTO AS ROLE MODEL

Key Topics

The following topics are addressed in the first segment of the telecourse.

- ☐ The qualities of an effective CTO
- ☐ How a CTO's attitude plays out in verbal and non-verbal interactions with a trainee
- ☐ Appropriate CTO/trainee relationship
- ☐ Establishing an environment (physical and emotional) that is conducive to learning
- ☐ What it means to be an advocate for the trainee

Discussion Questions

The following questions may be used in conjunction with this telecourse to encourage further discussion of the topics covered in this segment.

1. Having a positive attitude toward a trainee is important. However, it is not always possible for every trainer to personally like every trainee with whom they are called upon to work. How might a CTO prevent such a conflict from affecting the trainer/trainee relationship negatively? Is it possible for an individual to "fake" sincerity?
2. Demonstrating high ethical standards while working with a trainee is important. What about personal practices and life-style off the job? As long as one's personal choices are lawful, how do they impact the job of being a role model?
3. What enhances good communication between a trainer and a trainee? What causes communication to break down? What are some techniques a trainer might use to break through communication "road blocks" when they develop?
4. A CTO is in a position of authority over a trainee. To maintain an authoritative position and be respected, is it necessary to be feared? In your opinion, at what point does friendliness toward a

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trainee erode authority?

5. What are some examples of specific overt actions or practices on the part of a CTO that demonstrate the following?
 - Credibility
 - Objectivity
 - Approachability
 - Empathy
 - Pride
 - Integrity
6. The nature of a relationship often changes when pressure and stressful situations enter the picture. It is easier to show interest and concern when there is time to share and engage in a two-way discussion. In the communication center, there will be times when a trainer must respond quickly, give orders, and push authority. How can this be done without negatively threatening the trust and respect necessary in a trainer/trainee relationship?
7. As an advocate for the trainee, is it necessary to always take the side of the trainee? Give an example to support your answer

Before concluding this portion of the telecourse, instructors may wish to offer their own questions or topics for discussion as well as review specific agency policies and procedures regarding the CTO as a role model.

Additional Reference Information

The following information may be used in support of CTO training in this area.

Enhancing Trainer/Trainee Relationships

The relationship between trainer and trainee is important in motivating positive performance and influencing commitment to the profession. The more self-aware trainers are with their conduct and words, the better chance they will have on motivating better performance from their trainees.

The following behaviors and actions may help enhance the trainer/trainee relationship and motivate positive performance.

| CTO BEHAVIOR | ACTIONS |
|-------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <i>Show care and respect for the individual</i> | <ul style="list-style-type: none">• Respond in a timely manner to trainee requests and inquires.• Follow through; do what you say you will do.• Be patient and <i>listen</i> when a trainee comes to you with a concern or problem before offering advice.• Share information; explain why policies and information are the way they are. |
| <i>Show appreciation for good performance</i> | <ul style="list-style-type: none">• Provide ongoing positive feedback for behavior and work done well.• Reward good work by offering new challenges.• Give praise and say thank you for little things trainees do, not just for accomplishing major tasks.• When you receive a compliment from someone for something the trainee did or had input on, share it with the trainee and include it in the trainee's evaluation. |

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II: CTO AS TRAINER/COACH

Key Topics

The following topics are addressed in the second segment of the telecourse.

- ☐ The role of a trainer as a coach
- ☐ Promoting critical thinking and problem solving
- ☐ Improving verbal training skills
- ☐ Enhancing the trainers' active listening skills
- ☐ Dealing with difficult trainee types (the resistant trainee, the "know-it-all", etc.)

Discussion Questions

The following questions may be used in conjunction with this telecourse to encourage further discussion of the topics covered in this segment.

1. As the CTO, are you responsible for your trainee's success as a public safety dispatcher? Why or why not?
2. Being a CTO requires certain qualities and skills. What are your best CTO attributes? What areas do you feel you need to work on?
3. Encouraging critical thinking involves allowing trainees to solve problems on their own as the problems arise. Instead of watching a trainee become frustrated and stuck over a problem, what can a trainer do to help without falling into the trap of telling the trainee how to solve the problem?
4. What instructional method are you most comfortable using as a trainer? When you were a trainee, which method of training did you respond to best? Explain your answers.

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5. Communication centers can be very active environments, causing many distractions for trainees. What are some techniques or methods you have developed or implemented to keep trainees focused on you and the tasks they are performing?
6. What are some signs or indications that a trainee is experiencing culture shock? Information overload? Regression?

Before concluding this portion of the telecourse, instructors may wish to offer their own questions or topics for discussion as well as review specific agency policies and procedures regarding the CTO's role as a trainer and coach.

Additional Reference Information

The following information may be used in support of CTO training in this area.

Coaching Skills that Apply to Training

Approaching training as a coach allows you to lead and develop others to top performance. Coaching skills that apply to training include:

- *taking the time to plan.*
A coach does not just focus on what is happening now, but looks to the future with a set plan and goals.
- *working with each trainee to establish individual goals.*
A coach establishes priorities and expectations with the trainee early and reinforces them often.
- *challenging trainees to develop their own skills, capabilities and confidence.*
A coach spends more time asking questions than giving answers, presenting challenging opportunities that let trainees test themselves and encouraging learning and growth.
- *providing ongoing feedback, letting trainees know where they stand in terms of their performance at all times.*
When something is done well, performance feedback is promptly given. When something goes wrong, performance feedback is promptly given.
- *dealing with performance rather than personal issues.*
A coach focuses on solutions and provides the necessary support to help make improvement happen. This may include clarifying expectations, reviewing content, principles, or rationales, practicing basic skills, or developing new plans of action.
- *intervening early, not waiting for performance issues to become big problems.* A coach must be patient yet persistent and respond with a positive, solutions-oriented, firm touch.

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Motivating Active Learners

No matter what specific instructional technique or method is being used, trainers can encourage better understanding, and in turn, confidence on the part of their trainee by practicing the following:

| Positive Action | Rationale/Description |
|----------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <i>Encourage questions</i> | <ul style="list-style-type: none">• When asking questions, the trainee is more involved with what is being taught.• Constantly reinforce that it is OK to ask questions (even the same ones over again).• Periodically pause and ask, “Are there any questions about what we just covered?” or “What questions can I answer for you on what we have done?” |
| <i>Be receptive to questions</i> | <ul style="list-style-type: none">• Encouraging and responding to questions eagerly creates an atmosphere that makes learning safe.• Questions may arise not only when teaching, but later, when the trainee is putting information into practice.• Trainers/trainees can often explore issues in greater depth when questions are allowed to flow freely.• Consider a trainee’s questions as “gifts” and respond with “That’s a good question” or “I appreciate your asking”, etc. |

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| <i>Emphasize</i> <i>c</i> <i>r</i> <i>it</i> <i>i</i> <i>c</i> <i>a</i> <i>l</i> <i>t</i> <i>h</i> <i>i</i> <i>n</i> <i>k</i> <i>i</i> <i>n</i> <i>g</i> | <ul style="list-style-type: none">• Don't always <i>tell</i>; take the time to <i>ask</i> and have the trainee suggest solutions.• Create thinking challenges by asking questions that require reasoning abilities to answer.• Model how to think by explaining relationships, processes, rationales, reasoning, etc.• Reinforce that it is the trainee's responsibility to <i>think</i>, not just function or react. |
| <i>Give lots of</i> <i>f</i> <i>e</i> <i>e</i> <i>d</i> <i>b</i> <i>a</i> <i>c</i> <i>k</i> | <ul style="list-style-type: none">• Give brief informal feedback in the form of intermittent helpful comments on an ongoing basis (e.g., "That's good.", "You got it.", "That's OK, try again", etc.).• Formal feedback, both positive and negative, should be specific and observation-based.• Do not criticize mistakes; be positive for good efforts.• All feedback (formal and informal) should be sincere and helpful.• Be prepared to explain the what, why, and how of what they are doing. |
| <i>Take the time</i> <i>n</i> <i>e</i> <i>e</i> <i>d</i> <i>e</i> <i>d</i> | <ul style="list-style-type: none">• Remember, trainees know less than trainers.• Allow the time necessary for trainees to truly learn.• Don't expect to accomplish proficiency in one shot.• Occasionally, ask trainees to evaluate their own progress.• Regularly share your observations on the trainee's progress. |
| <i>Follow-up</i> | <ul style="list-style-type: none">• Allow trainees to function on their own.• Check frequently at first, then less often as confidence builds.• Make sure all feedback (positive and negative) is constructive. |

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| <i>Don't expect to</i> <i>b</i> <i>e</i> <i>a</i> <i>'</i> <i>k</i> <i>n</i> <i>o</i> <i>w</i> <i>-</i> <i>i</i> <i>t</i> <i>-</i> <i>a</i> <i>ll</i> <i>”</i> | <ul style="list-style-type: none">• Learning is an ongoing process for <i>everyone</i>. No trainer can know everything all the time.• If a question arises that you can not answer, admit you don't know then find out.• Demonstrating the working knowledge of where or how to find an answer is much more valuable to a trainee. |
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Common Trainee Reactions to the Learning Process

Not all trainees will react to the training process in the same manner.

The following table identifies a number of possible reactions or problems trainees might experience along with possible solutions.

| Reaction | Possible Solution |
|---------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <i>Culture shock</i> | <ul style="list-style-type: none">• Spend more time explaining what is happening in the communication center and why.• Provide reassurance. |
| <i>Lack of confidence</i> | <ul style="list-style-type: none">• Ask questions you know the trainee can answer or assign tasks the trainee can accomplish, then praise successes.• Add challenges gradually as confidence increases.• Ask guiding questions; allow trainees to verbalize solutions.• Express your own confidence in the trainee often.• Be specific when giving feedback.• Correct mistakes privately.• Focus on actions/observations, not personal issues. |
| <i>Over confidence</i> | <ul style="list-style-type: none">• Explain rationale for existing processes, procedures, etc..• Challenge by asking more thought-provoking questions.• Assign additional tasks to measure skills and abilities.• Focus on actions/observations, not personal issues.• Emphasize teamwork and cooperation within the communication center. |
| <i>Totally passive</i> | <ul style="list-style-type: none">• Repeat the question; be more specific or simplify the question before asking it again.• Wait patiently; time and silence may help stimulate the trainee's thoughts.• Tell the trainees that you'll wait for their answer or to feel free to gather their thoughts.• Silence, with patience, applies positive pressure and lets trainees know that trainers want them to think and want to hear what they have to say.• Irritated silence and outward anxiety on the part of the trainer can shut down the possible flow of conversation with trainee. |

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| <i>Plateauing (i.e., information overload)</i> | <ul style="list-style-type: none">• Recognize that each trainee has a different threshold.• Do not present any new information or tasks for a set time period.• Reinforce existing knowledge or skills.• Alter or revise instructional methods to stimulate interest and attention. |
| <i>Regression or Freezing</i> | <ul style="list-style-type: none">• Express your own confidence in trainee.• Review past instruction or skills taught.• Reinforce trainee's existing knowledge or skills.• Ask leading questions; allow trainee to verbalize solutions to a given challenge.• Alter or revise instructional methods. |
| <i>Confusion or poor retention</i> | <ul style="list-style-type: none">• Break down or simplify information further.• Reduce expected actions to fewer tasks at one time.• Be specific when giving feedback.• Provide more opportunities for practice.• Ask guiding questions; allow trainee to verbalize solutions to a given challenge.• Alter or revise instructional methods. |

Recognizing and Responding to Individual Trainee Needs

Every trainee is different. Training strategies and methods that may be successful with one trainee may not meet the needs of another. For this reason, a trainer must be receptive to individual learning needs and flexible to make changes or adjustments in training strategies as necessary.

| If a trainee resp onds best to.... | THEN... |
|-----------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <i>external motivation</i> | <ul style="list-style-type: none">• provide as much individualized attention and positive reinforcement as possible.• suggest peers provide feedback to one another. |
| <i>internal motivation</i> | <ul style="list-style-type: none">• provide specific reinforcement to confirm or modify trainee's own.• ask questions that allow trainee to verbalize rationale and thought processes. |
| <i>auditory instruction</i> | <ul style="list-style-type: none">• suggest that trainee repeat or talk through steps in an activity or process.• suggest trainee tape lectures or formal training sessions for personal review at a later time.• ask questions that allow trainee to verbalize rationale and thought processes. |
| <i>visual instruction</i> | <ul style="list-style-type: none">• provide visual directions, learning materials, or job aids.• demonstrate processes and procedures whenever possible.• use charts, tables, visual aids, etc. to convey information. |

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| <i>kinesthetic (i.e., activity oriented) instruction</i> | <ul style="list-style-type: none">• encourage note-taking while reading, listening, or watching.• employ role-playing or simulation when possible.• encourage trainee to assist in creating job aids or learning materials. |
|----------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

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Comparison of Instructional Methodologies

There is no magic formula to determine the most effective training method for a specific subject. The selection must be based on trainee needs, effectiveness with particular trainees, and external requirements, not just on personal preferences of the instructor. The following table identifies a number of advantages and disadvantages of a variety of instructional techniques.

| Method | Advantages | Disadvantages |
|-------------------------------|-----------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------|
| <i>Lecture</i> | + easy way to present a lot of information + inexpensive + allows for student questions/feedback | – poor information retention – requires instructor organization and preparation |
| <i>Small Group Discussion</i> | + varied opinions and input + inexpensive | – still need trainer input to maintain focus – participation by all not equal |
| <i>Role Playing</i> | + encourages quick thinking + stimulates analysis, problem solving + enhances information retention | – can be intimidating – unrealistic – overwhelming if too many objectives are involved |
| <i>Case Studies</i> | + realistic + enhances information retention + reinforces procedures, resources, policies, etc. | – intimidating – does not encourage individual critical thinking – can involve too much varied information |

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| <i>Field Trips</i> | + | varied surroundings stimulating/motivating | – – – | physical logistics time expensive |
| <i>Guest Speakers</i> | + | introduces different viewpoints, ideas | – | consistency of information, objectives, etc. |
| | + | change from routine | – – | physical logistics, requirements expensive |
| <i>Computer</i> <i>B a s e d</i> | + | trainee-controlled pace | – | equipment requirements |
| | + | instant feedback | – | poor quality if not professionally designed and developed |
| | + | can enhance other forms (e.g., lecture) | – | often passive, verbal |
| | + | visually stimulating | – – – | can be confusing or intimidating expensive |
| <i>Audio</i> | + | realistic to work environment | – | equipment requirements |
| | + | inexpensive | – | poor quality if not professionally made |
| | + | trainee-controlled pace | – | passive, no interaction or feedback |
| | + | can enhance other forms (e.g., lecture) | | |
| <i>Video</i> | + | trainee-controlled pace | – | equipment requirements |
| | + | can enhance other forms (e.g., lecture) | – – | poor quality if not professionally made |
| | | | – | passive, no interaction or feedback |
| <i>Print/ Hand</i> <i>O u t s</i> | + | trainee controlled pace | – | passive, no interaction or feedback |
| | + | can enhance other forms (e.g., lecture) | | |

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| <i>Games/ Simulation</i> | + entertaining + stimulates analysis, problem solving + enhances information retention | – may encourage competition – easily stray from primary focus/objective |
|------------------------------|----------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------|

III: CTO AS EVALUATOR

Key Topics

The following topics are addressed in the third segment of the telecourse.

- ☐ Responsibilities of an evaluator
- ☐ Providing constructive oral feedback (negative and positive) that will guide trainee performance
- ☐ Recognizing and managing personal biases (negative and positive) and their influence on one's ability to judge fairly
- ☐ Using performance, actions and progress of trainee (versus assumptions or opinions of trainer) as a basis of evaluation
- ☐ Addressing defensiveness or low self-esteem on the part of the trainee as a response to feedback
- ☐ Improving the effectiveness of written evaluations

Discussion Questions

The following questions may be used in conjunction with this telecourse to encourage further discussion of the topics covered in this segment.

1. Think back to when you were a trainee. Was the informal, day-to-day feedback you received from your CTO helpful? What did the CTO do to make it a positive or negative experience for you?
2. Give examples that illustrate the differences between criticism and negative feedback; praise and positive feedback. Is constructive feedback any easier for the CTO to provide than praise or criticism? Why or why not?
3. What is the difference between an interpretation and an observation? Give an example of both to illustrate your answer.
4. Which is the more challenging type of trainee for you to evaluate: a defensive trainee who always has an excuse, or a trainee with low self-esteem who is constantly seeking approval? Give a reason for your answer.

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5. When was the last time you referred to your agency's written performance objectives and standards? How did you use them? In preparation for a training event? In the course of a discussion with a trainee? When preparing a written performance appraisal?
6. If you could modify the format or process your agency uses during the formal performance appraisal process, what would you do? Give your rationale for your answer.

Before concluding this portion of the telecourse, instructors may wish to offer their own questions or topics for discussion as well as review specific agency policies and procedures regarding the CTO's role as an evaluator.

Additional Reference Information

The following information may be used in support of CTO training in this area.

Performance-Based Evaluations

The purpose of offering feedback, negative or positive, is to help modify or guide the performance, actions or progress of a specific trainee. To accomplish this, the trainer must be very specific as to what the expected performance is and what the trainee is doing or not doing to attain that level of performance. Words of encouragement (e.g., “Nice work.”) may boost a trainee’s self-esteem but they may not help encourage or modify specific trainee performance.

The following table identifies a number of ways a trainee can ensure that both positive and negative feedback given to a trainee is constructive and performance based.

| Action | Rationale/Description |
|---------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <i>Provide timely feedback.</i> | <ul style="list-style-type: none">• Feedback that is given as close as possible to when an action occurs is most effective and retained the longest.• Feedback that is given consistently throughout training, not just during formal evaluation periods, is less threatening. |

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| <i>Be performance and information specific.</i> | <ul style="list-style-type: none">• Base all observations on actions and performance; not feelings or assumptions.• Constructive (positive or negative) feedback focuses on the specific performance or action that has led to an outcome or a standard that has or has not been met.• Constructive negative feedback does not necessarily have to be in response to bad performance. An outcome may have been acceptable, but the performance may not have been up to a specified standard.• State observations (what was seen or heard) not interpretations (judgmental analysis or opinions regarding what was seen or heard). |
| <i>Encourage discussion.</i> | <ul style="list-style-type: none">• Make sure the trainee understands exactly what they have done that is correct or needs to be modified.• Ask the trainee to consider <i>why</i> their action was acceptable or not acceptable based on the situation to encourage critical thinking.• Ask questions that encourage ‘thinking out loud’ on an ongoing basis. |
| <i>Don’t play games.</i> | <ul style="list-style-type: none">• Training is not a game with prey (the trainee) and predator (the trainer).• Trainees need to feel that during their training period it is safe to make mistakes and that the trainer is there to help guide them, not only to find fault and criticize. |
| <i>Never give contrived feedback.</i> | <ul style="list-style-type: none">• All feedback, positive and negative, should be based on real performance and actions, and have a purpose.• Contrived feedback reduces the effectiveness of all other evaluations given by the trainer.• Over time, the trainee’s respect for a trainer can also be harmed. |
| <i>Constantly test your own objectivity.</i> | <ul style="list-style-type: none">• Personally review agency performance standards and guidelines periodically to reinforce objectivity.• Before offering feedback, ask yourself <i>what</i> performance/action was observed and <i>why</i> it did or did not achieve the desired outcome or meet the established standard. |

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Constructive Feedback vs Praise or Criticism

All evaluations can be given in two ways: through constructive feedback or through praise and criticism. It is important that trainers understand the difference in order to practice the more effective techniques.

| | Description | Additional Information |
|------------------------------|--------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Constructive Feedback | Information specific, issue-focused and based on observations of performance, effort, or outcome | <ul style="list-style-type: none">• Can be either positive or negative• Purpose is to create awareness that leads to improving poor performance or reinforcing good performance• Comes across as more objective and nonjudgmental• Based on issues of performance (not right or wrong)• Based on known standards of performance or desired outcomes• Encourages discussion and questions that can enhance future performance• Requires time, effort, and thought on the part of the trainer |

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| <i>Praise or Criticism</i> | Personal judgements based on opinions or feelings about a performance effort or outcome | <ul style="list-style-type: none">• Often general and vague and focused on the person rather than actions or outcomes• Often seen as hollow or lacking in substance• Without actions or performance as focus, comments can be interpreted as personal and threatening• Leads to trainee confusion as to what is expected and what the standards are• Often leads to defensiveness or misguided confidence |
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Guidelines for Giving Constructive Oral Feedback

Whether a trainer is offering positive or negative feedback, the guidelines for giving *constructive* feedback are relatively the same.

| | Action | Additional Information |
|---------------------------------|---------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Content: <i>What to say</i> | <ul style="list-style-type: none">Identify action, performance, or outcome involved | + State clearly in first sentence of feedback |
| | <ul style="list-style-type: none">Provide specific points | <ul style="list-style-type: none">Give examples or offer evidenceBegin feedback with “I ...” rather than “You ...” to take focus off the individual.Examples: “I saw you ...”, “I’ve observed that” |
| Manner: <i>How to say it</i> | <ul style="list-style-type: none">Be direct | <ul style="list-style-type: none">Hesitation happens most often when giving negative feedbackGet to the point |
| | <ul style="list-style-type: none">State observations, not interpretations | <ul style="list-style-type: none">Observations are more factual and nonjudgmentalExamples: “I noticed that you, which has me concerned because.....”; “I saw you.... Because of that, you were able to.... Good job”Interpretations reflect a trainer’s analysis or opinionExamples: “You seem confused about” “That call went very well.” |

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| | <ul style="list-style-type: none">• Avoid ‘need to’ statements | <ul style="list-style-type: none">– Implies something did not go well rather than focusing on actual performance– Examples: “You need to ask more direct questions.” versus “I heard you say The caller may not have understood that you wanted to know.....” |
| | <ul style="list-style-type: none">• Avoid mixed messages | <ul style="list-style-type: none">– Creates confusion and contradictions for the trainee– Reduces credibility of trainer in trainee’s eyes– Separate positive feedback from negative feedback– Using positive feedback only to soften negative feedback dilutes any real sincerity in either– Examples: “The tone of your voice was good but.....”, “Your questions were direct however.....” |
| | <ul style="list-style-type: none">• Be sincere | <ul style="list-style-type: none">– Tones of anger, disappointment, sarcasm, etc., can color the sincerity of the message (creating <i>criticism</i>)– In positive feedback situations, express appreciation. (NOTE: Appreciation alone is <i>praise</i>. When specifics are added, it becomes constructive feedback.)– In negative feedback situations, express concern to communicate importance and caring |
| Timing: <i>When to say it</i> | <ul style="list-style-type: none">• Give constructive feedback when it is most effective | <ul style="list-style-type: none">– Constructive feedback should be offered as soon as reasonably possible to reinforce specific action or performance– If feedback is negative, trainer may require more time to get thoughts in order and ensure comments are not just a reaction to an event and become a form of <i>criticism</i> |

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| | <ul style="list-style-type: none">• Constructive feedback should be given on an ongoing basis | <ul style="list-style-type: none">– Constructive feedback should reflect trainee’s actual performance throughout training period– Do not take positive performance for granted after positive feedback was given one time; reinforce positive actions regularly |
|--|-------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

Addressing Trainee Reaction Toward Feedback

A handful of trainees will be sensitive and react either defensively or negatively whenever a trainer attempts to give them constructive negative feedback or a negative formal evaluation. Such responses make trainer/trainee discussions very difficult and can greatly hinder the learning process. The following table identifies a number of ways to prevent, or work through, defensiveness or low self-esteem and minimize their effect on the training process.

| Trainee Reaction | Trainer Actions |
|-------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <i>Low self-esteem</i> | <ul style="list-style-type: none">• Focus on tangible behaviors or actions and desired outcomes, not personal assumptions or interpretations.• Resist temptation to give false positive feedback or shy away from giving negative feedback.• Don't use positive feedback as a prelude to negative feedback.• Focus on successes, not failures.• Express confidence and respect for the trainee.• Allow trainee to do work you know they can succeed in to provide a "taste of success" before moving to more challenging tasks.• Assure trainee that you will work with them to achieve desired outcomes. |

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| <i>Defensiveness</i> | <ul style="list-style-type: none">• Remain non-judgmental. Focus on actions and observations, not assumptions, opinions or characterizations.• Be sincere and straight forward; don't hesitate or become apprehensive.• Communicate appropriate sense of concern in both verbal and non-verbal language and tone.• Don't allow trainee to interrupt; ask them to wait until you finish talking.• Speak in positive terms and be specific. Focus on behaviors you <i>want</i> to see rather on what you don't want to see.• Listen patiently and respectfully.• Don't debate. Debates can lead to trainer defensiveness as well.• Assure trainee that you will work with them to achieve desired outcomes. |
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Guidelines for Completion of Formal Performance Evaluations

The trainee is dependent on the trainer for guidance through the training process.

The written performance evaluation is an informational and motivational tool by which a trainer can document progress and encourage dialogue between trainees, trainers, and supervisors. The following table identifies a number of ways trainers can help ensure their written performance evaluations convey a clear picture of exactly how the trainee is progressing.

| Area | General Guidelines |
|--------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <i>Preparation</i> | <ul style="list-style-type: none">• Keep daily notes to refer to later when writing formal appraisals.• Refer to copies of past evaluations to identify areas where improvement has or hasn't been made.• Evaluation of performance should be a continuous process involving close communication between trainer and trainee. There should be no surprises in the written performance evaluation.• Review agency evaluation standards and training objectives on a regular basis to maintain perspective and objectivity.• Use the appraisal process to set standards and goals for individual trainees to ensure they know exactly what is expected of them. |
| <i>Objectivity</i> | <ul style="list-style-type: none">• Document and compliment the trainee when performance has been good or outstanding, not just when problems exist.• If performance has been satisfactory, write in such a way as to encourage improvement to a higher level.• Avoid writing something just to be nice. Refer to demonstrated strengths for specific sources of positive feedback. |

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| <i>Specificity</i> | <ul style="list-style-type: none">• Focus on patterns or continuing problems, not just one isolated incident occurring on an “off day”.• If a specific incident or observation merits note, include date and time as well as other relevant facts involved.• Be specific in wording. Avoid generalizations. Avoid hinting or being too subtle in comments as they may be easily misunderstood.• Be prepared to support all statements with facts.• Check report for accuracy before any trainee or supervisor conference. (A typographical error in a date or comment can become an issue if it changes the facts.) |
| <i>Remediation</i> | <ul style="list-style-type: none">• Trainees should be rated “improvement needed” only when they are not performing at a level consistent with that point in the training process, not at the level expected at the end of training.• Avoid overusing the word “you” in criticizing. Stress <i>what</i> is wrong and <i>how</i> it is to be improved (rather than on <i>who</i> is wrong.)• When performance does not meet accepted standard, be sure to include:<ul style="list-style-type: none">– a statement of the problem or concern,– the desired improvement,– suggestions as to how to improve, and– provisions for assisting the trainee to meet the standard. |

Influences on Trainer Objectivity

Whenever one human being is called upon to evaluate another's performance, there is the potential to unconsciously be influenced by a number of factors. Errors based on such influences are common and committed by all trainers from time to time. In order to remain objective and provide the most constructive and helpful feedback to a trainee, trainers must first be aware of the presence of the following effects.

| Influence | Description | Additional Information |
|--------------------------|-------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <i>Halo Effect</i> | Allowing a trainee's performance in one area to influence the rating in other areas | <ul style="list-style-type: none">• Even though skills may be closely related, careful attention must be paid to the actual behavior or performance in the specific skill or objective being evaluated. |
| <i>First Impressions</i> | Allowing initial positive performances to overshadow later negative actions | <ul style="list-style-type: none">• Focus on each step in the training process separately.• Base evaluation on the performance objectives for that step only. |

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| <i>Personal</i> <i>I</i> <i>d</i> <i>e</i> <i>n</i> <i>t</i> <i>i</i> <i>f</i> <i>i</i> <i>c</i> <i>a</i> <i>t</i> <i>i</i> <i>o</i> <i>n</i> | Awarding higher ratings based on shared personal characteristics, experiences or approaches to a situation | <ul style="list-style-type: none"> • Trainers must remind themselves that they are not the ones being evaluated. • Re-focus on the expected performance and desired outcomes of each training objective. |
| <i>Lenience Effect</i> | Tendency to give trainee the benefit of the doubt | <ul style="list-style-type: none"> • Often easier for trainer to be generous than to give a lower rating. • Trainer may falsely believe that a higher rating will boost self-esteem and later improve performance. • Only honest evaluations, positive or negative, are helpful to the trainee. |
| <i>Central</i> <i>T</i> <i>e</i> <i>n</i> <i>d</i> <i>e</i> <i>n</i> <i>c</i> <i>y</i> | Avoiding extreme positive or negative ratings | <ul style="list-style-type: none"> • It may be less threatening to “play it safe” and give only median ratings. • Assuming that no one is that good or bad. • Recognize that every trainee has strengths and weaknesses; use the full range of rating scales to identify them. |

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| <i>Contrast Effect</i> | Rating trainees against each other's performances | <ul style="list-style-type: none">• Trainee can look very good or very bad in contrast with another very low or very high person.• Evaluations must be based on specific performance objectives and outcomes and not against the performance of another trainee. |
| <i>Stereotypes</i> | Rating a trainee based on what is expected rather than on what is actually observed | <ul style="list-style-type: none">• Can involve closely-held and sometimes unconscious trainer values and biases.• Focus observations on individual trainee actions and specific performance objectives and outcomes desires. |

**Principles of Effective Communication During the Formal
Evaluation Process**

The following table presents the basic principles of all forms of communication; especially communication between a trainer and trainee during a formal performance appraisal.

| Principle | Rationale and Implementation |
|---------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <i>Seek to clarify your ideas before communicating.</i> | <ul style="list-style-type: none">• The more systematically we analyze the problem or idea to be communicated, the clearer it becomes.• Because communication is a virtually continuous process, we commonly express our thoughts or feelings without having clarified what we are trying to accomplish. |
| <i>Examine the true purpose of each communication.</i> | <ul style="list-style-type: none">• Before you communicate, ask yourself what you really want to accomplish with your message (i.e., to obtain information, initiate an action, modify another person's actions or attitude, etc.).• Identify your goal then adapt your language, tone and approach to serve that specific objective.• Don't try to accomplish too much all at once. The fewer the objectives, the sharper the focus of the communication and greater the chance of success. |
| <i>Consider the total physical and human setting.</i> | <ul style="list-style-type: none">• Time, place, and climate all influence the perceptions, expectations and aspirations that appear in communications. |
| <i>Consult with others, when appropriate.</i> | <ul style="list-style-type: none">• Asking for input from others when planning a communication or developing the facts on which to base it often helps lend additional insight and objectivity to your message.• Those who have helped plan your communication (i.e., management personnel) will often give it their active support. |

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| <i>During communication, be mindful of overtones as well as basic content of message.</i> | <ul style="list-style-type: none">• Choice of language, particularly awareness of the shades of meaning and emotion in words used, predetermines in large part the listener's reactions.• Subtleties of communication (e.g., tone of voice, non-verbal expressions, apparent receptiveness to the responses of others) often affect a listener's reaction to the message more than its basic content. |
| <i>Listening is the most important and most difficult skill in communication.</i> | <ul style="list-style-type: none">• Be a good listener. When we start talking, we often cease to listen.• Stay attuned to the trainee's unspoken reactions and attitudes.• Consider the listener's implicit meanings and undertones as well as unspoken words. |
| <i>Find out the rationales behind the trainee's thinking or actions.</i> | <ul style="list-style-type: none">• Ask questions that might help the trainee look at the thinking behind the actions.• Allow the trainee to suggest how their actions affected the outcomes or did or did not meet established standards.• Listen all the way through to what the trainee has to say and ask additional questions if necessary so that trainee fully explains actions or performance.• Technique can be used when reinforcing positive performance as well as modifying negative. |
| <i>Follow-up on your communication.</i> | <ul style="list-style-type: none">• All efforts may be wasted if you do not follow-up to see how well the message was received.• Ask questions and encourage the listener to express a reaction. |

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| <i>Be sure follow-up actions support your commu nicatio n.</i> | <ul style="list-style-type: none">• The most persuasive kind of communication is not what you say, but what you do.• When actions or attitudes contradict words, the listener will discount what is said. |
|----------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|